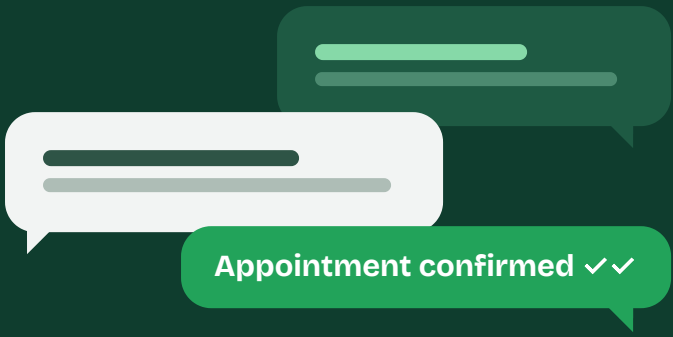
SAMWAD

WHITEPAPER · HEALTHCARE · 2026



The Patient Communication Guide: WhatsApp for Clinics and Hospitals

How Indian clinics and hospitals use WhatsApp to answer patients, book and remind appointments, share reports with consent and bring patients back for follow-ups.

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5 stages
The patient journey, from first question to follow-up

3 automations
The first ones to switch on, step by step

6 metrics
A scorecard for your front desk

30 days
A week-by-week launch plan

samwad.tech

Arpneet AI Technologies Pvt. Ltd. · Built in India

EXECUTIVE SUMMARY

The front-desk phone stands between a patient and an appointment.

At many clinics in India, patients call to ask about timings, doctors and fees, and to book. When the line is busy or the clinic is closed, the patient books somewhere else.

This guide shows how to run patient communication on WhatsApp with SAMWAD: five stages from first question to follow-up, the first three automations, sample templates and a 30-day plan. It covers admin and reminders, not medical advice.

In this guide

- The five-stage patient journey, with one number to watch at each stage
- Three automations: booking, reminders and report-ready alerts
- Sample Utility and Marketing templates, with buttons
- A scorecard, common mistakes and a 30-day plan

WHY NOW

The case for WhatsApp

$122.3B

India's hospital market in 2025, in US dollars[1]

$202.5B

the hospital market projected for 2030, in US dollars[2]

Sources. 1, 2. IBEF (India Brand Equity Foundation), Healthcare Industry in India, 2026, ibef.org/industry/healthcare-india.

The usual way

Phone calls and paper slips. The line is busy at peak hours. Reminders depend on someone remembering to call. Reports are collected in person, and follow-ups slip.

On WhatsApp

One chat, question to follow-up. YARA answers timings and fees, patients book and reschedule in a form, reminders go out on schedule, and clinical questions go to your staff.

THE FRAMEWORK

The patient journey on WhatsApp

Most clinics use WhatsApp for reminders only. Run all five stages in one chat and each patient's bookings, reports and questions sit in one thread your front desk can see.

See the full patient journey:
samwad.tech/industries/whatsapp-for-healthcare

Stage 01

Question

A patient asks about timings, doctors, fees or location.

SAMWAD: YARA answers; the Voice AI Agent answers WhatsApp calls and books appointments; anything else goes to the front desk.

Watch: Questions answered without a handover

Stage 02

Booking

The patient wants an appointment.

SAMWAD: Doctor, date and time in a WhatsApp form; confirmation with the clinic address; bookings can go to your clinic system.

Watch: Bookings made on WhatsApp

Stage 03

Reminder

The appointment is coming up.

SAMWAD: Day-before and same-day reminders; confirm, cancel or reschedule with one tap; the next free slots offered.

Watch: No-show rate

Stage 04

Reports

The patient’s report is ready.

SAMWAD: A report-ready alert sent with the patient’s consent; the report as a PDF or link; questions go to the right team.

Watch: Reports collected in person

Stage 05

Follow-up

The patient needs a follow-up, refill or vaccination.

SAMWAD: Reminders for follow-up visits, refills and vaccinations; feedback after each visit; check-up packages and camps for opted-in patients.

Watch: Follow-up visits kept

DESIGN RULE

YARA handles admin, people handle care. Any clinical question goes to your staff, never to the bot.

PLAYBOOK

The first three automations to switch on

01 · Booking

Booking

Trigger: a patient asks to book in the chat or on a WhatsApp call.
Message: a WhatsApp form with doctor, date and time.
Next: a confirmation with the clinic address.

Watch: bookings made on WhatsApp

02 · Reminder

Reminders

Trigger: the day before and the morning of the visit.
Message: time, doctor, and confirm, cancel or reschedule buttons.
Next: a reschedule shows the next free slots.

Watch: no-show rate

03 · Reports

Report alerts

Trigger: a report is ready and the patient has agreed to get it here.
Message: a short alert, then the report as a PDF or link.
Next: questions go to the right team.

Watch: reports collected in person

SAMPLE TEMPLATES

What the messages look like

Illustrative examples. Each {{1}}, {{2}} is a variable filled in for each customer.

ILLUSTRATIVE

Hi {{1}}, a reminder of your appointment with {{2}} tomorrow at {{3}}. Please confirm or choose a new time.

Confirm

Reschedule

Utility template · appointment_reminder

ILLUSTRATIVE

Hi {{1}}, your report from {{2}} is ready. Tap below to view it.

View report

Can the doctor explain this to me?

Utility template · report_ready

ILLUSTRATIVE

Hi {{1}}, {{2}} is running a check-up camp on {{3}}. Tap below to book a slot.

Book a slot

Stop updates

Marketing template · checkup_camp (opted-in only)

Which template is which

Booking confirmations, reminders and report-ready alerts are **Utility** templates: appointment information only, no promotion. Check-up packages and health camps are **Marketing** templates, sent only to patients who opted in. After a patient messages you, you can reply freely for 24 hours; then you need an approved template.

Keep diagnoses and test details out of templates, and send reports only with consent.

WHAT GOOD LOOKS LIKE

What good looks like

Track a few numbers from week one, so you can see what WhatsApp is doing for your front desk and your patients.

Your scorecard

No-show rate — Weekly

Missed appointments ÷ appointments booked

WhatsApp bookings — Weekly

Bookings made on WhatsApp ÷ all bookings

Reschedules kept — Weekly

Reschedules ÷ (reschedules + cancellations)

Calls to the front desk — Weekly

Calls per day, before and after launch

Follow-ups kept — Monthly

Follow-up visits completed ÷ follow-ups due

Feedback score — Monthly

Average rating from post-visit feedback

Common mistakes

- Letting the bot answer clinical questions instead of handing them to staff
- Sending reports without the patient's agreement
- Putting diagnoses or test names in template text
- Sending camp and package offers to patients who never opted in

What YARA does not do

YARA does not give medical advice. It answers admin questions such as timings, doctors, fees and location, and hands anything about symptoms, medicines or reports to your staff with the full chat.

YOUR FIRST 30 DAYS

A 30-day launch plan

WEEK 1

Connect and approve

Connect your WhatsApp Business number. Add timings, doctors, fees and location for YARA. Submit booking and reminder templates to Meta.

WEEK 2

Book and remind

Switch on the booking form, confirmations, and day-before and same-day reminders.

WEEK 3

Answer and route

Turn on YARA for admin questions and the Voice AI Agent for WhatsApp calls. Route clinical questions to staff.

WEEK 4

Reports and follow-ups

Collect consent for reports on WhatsApp. Switch on report alerts and follow-up reminders. Review the scorecard.

Before week 1: your systems

Connect your clinic or hospital system through ready-made integrations, the API, webhooks or Zapier, so bookings and report alerts flow both ways. Agree with your doctors which questions YARA may answer.

BEFORE YOU GO LIVE

Consent and content checklist

- [ ] **Opt-in:** ask at registration or in the chat, say what you'll send, and keep a record.
- [ ] **Template categories:** bookings, reminders and report alerts as Utility; packages and camps as Marketing.
- [ ] **Opt-out:** add a "Stop updates" button to Marketing templates and act on it straight away.
- [ ] **Quiet hours:** send reminders and offers in the daytime, not late at night or early in the morning.
- [ ] **Handover:** anything clinical, urgent or sensitive goes to your staff with the full chat.

Five questions to ask any WhatsApp platform

1. Is it built on the official WhatsApp Business API?
2. Can patients book, confirm and reschedule without calling?
3. Does the AI agent hand clinical questions to staff instead of answering?
4. Can it send reports only to patients who agreed?
5. Will someone help me write templates and get them approved?

Send your first appointment reminder on WhatsApp this week.

Book a demo and we'll set up your first automation from this guide with you, or start a free trial.

Demo calendly.com/avaneet-techelligenceai/book-a-demo
Trial app.samwad.tech/register
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